

ADMINISTRATOR GUIDE

ISI[®] COMPACT DISC EDITIONS

Version 1.1



Institute for Scientific Information[®]

Table Of Contents

I. Program Overview	1
System and Software Requirements	1
Program Files	1
II. Installation Instructions	2
Starting the Program	2
III. The ISI CD Editions Setup Utility	3
Preventing Scan of Drives when Databases are Changed	3
Disabling the ISI Document Solution™ Order Option	3
Disable Scanning of Sub-directories for Databases	3
Entering Requester Information for Document Orders	3
Setting Maximum Records for Printing and Saving	4
Setting Default Views for Displaying, Saving, and Printing	4
Setting Default Export File Format	4
Setting Time-Out Interval	4
Setting Auto-Scan Interval	4
IV. The ISI CD Editions Local Holdings Utility	5
The Local Holdings Utility Window	5
Journal Lists	6
Entering Holdings Information	6
Viewing Holdings Information	7
Exporting Holdings Information	7
Updating Holdings Information	8
Exiting	8
V. Downloading Databases to Hard Drives	9
VI. Technical Help	11

I. Program Overview

The following installation instructions describe how to install the ISI CD Editions program for Windows on a single computer.

The ISI CD Editions for Windows program consists of the main program (CDEWIN.EXE), and two administrative utilities: the ISI CD Editions Setup Utility (CDEADMIN.EXE), and the ISI CD Editions Local Holdings Utility (HOLDINGS.EXE). All are described in detail in this booklet. The program and utilities will use about 6MB of space on the hard drive.

System and Software Requirements

To use the ISI CD Editions program on an individual computer, the computer will need to be a Windows system with:

- IBM 486 or higher PC or compatible computer
- Hard disk with at least 3MB free for temporary files (after installation)
- 4MB of RAM (8MB recommended)
- MS-DOS version 3.3 or higher (6.2 recommended)
- MS-Windows version 3.1 or higher

Program Files

The ISI CD Editions program creates and uses certain files in order to run efficiently and allow access to user-specified options and defaults. These files are:

- The **CDEWIN.INI** file contains your administrative preferences, established during your ISI CD Editions Setup Utility session
- The **HOLDINGS.INI** file contains preferences established during your ISI CD Editions Local Holdings Utility session
- The **HOLDINGS.DAT** file contains the markings and holdings messages established during your ISI CD Editions Local Holdings Utility session

See Figure 1 on page 12 for a complete listing of ISI CD Editions files and their locations.

II. Installation Instructions

To install ISI CD Editions to a hard drive:

1. Inserting the ISI CD Editions program diskette into drive A (or appropriate drive for your machine).
2. From the Windows Program Manager, select **Run** from the File menu, type in **a:\setup.exe**, and follow the prompts. Select a hard drive to install the software to.

Before any ISI CD Editions files are installed, you will get a dialog asking for the following information:

- name of user or department
- name of company
- customer ID (your account number, found on your mailing label)

These registration items are stored in the CDEWIN.INI file, located in the subdirectory where the ISI CD Editions program software is installed.

After installing the ISI CD Editions to the hard drive, you can run the software.

Starting the Program

To start the ISI CD Editions program:

1. Place an ISI CD Editions database into your CD-ROM drive.
2. From the Program Manager, double-click the ISI CD Editions icon.



ISI CD Editions

When the program starts, it automatically selects the **Open ISI Databases(s)** command. This command scans the root directories of drives C through Z and one directory level deep (unless the "Disable Scanning of Sub-directories for Databases" option is set in the CDE Setup Utility). If only one database is found, the program automatically opens that database. If multiple ISI databases are found, the program displays a dialog box listing those databases. Select the database(s) to open and click on **Open**.

For more information on opening and changing databases, see the ISI CD Editions program help.

III. The ISI CD Editions Setup Utility

The ISI CD Editions program includes a Setup Utility which allows you, as the program administrator, to predefine some program settings. From the Program Manager, double-click the ISI CD Editions Setup Utility program icon to start the program. The following settings can be controlled:

Preventing Scan of Drives When Databases are Changed

Causes the main program to save the ISI CD Editions databases and their locations found when the program is started. Subsequently, the program will not scan each drive when you change databases. Instead, the program refers to the saved list of drives and databases. Established for CD-ROM juke-boxes and multi-disc changers, this option will speed the changing databases process, particularly if you are using multiple CD-ROM drives containing only a few ISI databases. However, if you add a new drive or change a disc while having this option selected, they will not be scanned until the program is restarted.

Disabling the ISI Document Solution™ Order Option

Prevents users from generating an order for ISI Document Solution (formerly The Genuine Article), the document delivery service from ISI. The IDS checklist will remain active, but the Print IDS Order and Save IDS Order options will be inactive.

Disabling Scanning of Sub-directories for Databases

The **Open ISI Database(s)** and **Change Compact Disc** commands, by default, scan the root directories of drives C through Z and the first-level subdirectories in those drives for ISI databases. This setup option allows you to disable subdirectory scanning, so only the root directories are scanned.

By scanning the first level sub-directories of a drive, you can set up an entire CD-ROM tower as one drive letter and specify the individual CD-ROM drives as sub-directories. (Refer to your CD-ROM tower documentation for more information.) This allows you to have many databases available to the CDE user.

Entering Requester Information for Document Orders

Allows you to specify the default information that appears on orders for ISI Document Solution.

To enter default Requester Information:

1. Click on the **Requester Information** button in the Setup Utility dialog box. The Requester Information dialog box appears.
2. Fill in the form with the requested information. This information will remain in the main program until you update it.
3. When the form is complete, click on **OK**.

Setting Maximum Records for Printing and Saving

Establishes the maximum number of records users will be allowed to print or save. If users attempt to print or save more than this number, they will receive a message that only the defined number will be allowed. To set no limit to the number of records that can be printed and saved, enter -1.

Setting Default Views for Displaying, Saving, and Printing

Establishes default views for displaying, printing, and saving records (custom views cannot be selected here). Record views determine which data fields appear (title, author, address, etc.) and in what order. Users can change the view formats and use custom views during a session; the default view will be restored when the program is restarted or a new session is selected.

Setting Default Export File Format

Establishes a default file format for saving (exporting) records. Which format you choose depends on how you intend to use the exported records. Users can change the export format during a session; the default format will be restored when the program is restarted or a new session is selected.

Setting Time-Out Interval

Establishes a time interval (in minutes) after which, if no activity has occurred, the current search session and any unsaved marked lists will be cleared. At the preset time interval, a warning message is displayed which counts down the remaining time and alerts the user that any unsaved searches and records will be lost. If there is no response to the warning message, the current search session clears and the program displays new Enter/Modify Query and Search History windows. To set no time-out interval, enter -1.

Setting Auto-Scan Interval

Establishes a time interval (in seconds) between records displayed in the Results window, when using the auto-scan option.

IV. The ISI CD Editions Local Holdings Utility

The Local Holdings Utility allows you to create holdings messages, and assign these messages to journals and book series in the ISI CD Editions databases that also appear in your institution's collection. These messages are then reflected in the main ISI CD Editions program, so users can see which of their selected records are located in the institution's collection.

Users will see marked holdings in displayed, printed, and saved records in most record views (exceptions include the Title Only view and any custom views that do not display the "Holdings" field tag). The holdings message appears immediately after the Source Title information.

When you open the Local Holdings Utility program, the root directory and one subdirectory level deep of all CD-ROM drives are searched for ISI CD Editions databases, and the journal list from the most current database is downloaded to your hard drive. The journal list contains all journal titles from all ISI CD Editions, and is stored in the JOURNAL.CVG file, located in the same directory as the HOLDINGS.EXE and CDEWIN.EXE files.

It is important you have the most recent database loaded (January-June 1996 and forward) the first time you open the Local Holdings Utility.

Once a journal list is downloaded to your JOURNAL.CVG file, it is not necessary to keep a database in your CD-ROM drive(s) to use the journal list. If the Local Holdings Utility program is opened without a database loaded in your CD-ROM drive(s), the program will utilize the journal list stored in the JOURNAL.CVG file on the server.

To update your journal list, see *Updating Holdings Information* on page 8.

The Local Holdings Utility Window

The Local Holdings Utility window is the main window of the utility. All activity occurs from this window.

The holdings messages you create will appear in the upper part of the window.

Full journal titles and their ISSN numbers appear in the bottom part of the window. The journal list is sorted alphabetically by journal title. A blank entry in the ISSN column indicates an ISSN number is not available for that publication. Holdings messages are entered as numbers in the Message column next to individual journals.

Use the scroll bar to move through the journal titles, or click on the **Move to** button and type in a journal name to go directly to that journal.

Journal Lists

There are two ways to control which journals are displayed. Both methods may be used in tandem.

- The first is to use the View menu to limit your list to the journals covered by specific ISI CD Editions. When the program first opens, the default setting displays all ISI CD Editions products, as indicated in the View menu by checkmarks next to each product. Select the products you want to remove from display. As you select each, the program automatically updates the journal list, and the checkmark is removed in the View menu. To reselect an edition, simply select it again from the View menu.

Note: The default view allows tagging of multiple products simultaneously, as well as tagging selectively covered titles in all products except SCI®.

- The second way to control journals displayed is to click on the **Restrict List** checkbox at the bottom of the window. The Restrict List option allows you to tag holdings as frequently as you like. The Restrict List checkbox allows you to display only those journal titles with changes since a selected period. Select the desired month and year using the drop-down lists provided, then click on the checkbox. The program will automatically update the journal list to reflect these limits.

Note: The Restrict List option functions with current data (1996 and forward) only.

Entering Holdings Information

The marking of messages is done in a two-step process.

- Create holdings messages by entering message text in the upper part of the Local Holdings Utility window. Up to 25 user-defined messages may be created.
- Apply holdings messages to the journals listed in the lower part of the Local Holdings Utility window.

To create holdings messages:

1. Beginning with message #1, place your cursor in the text box and type in a message (e.g., name of library, "Not in Stacks", etc.). The Edit menu commands (Undo, Cut, Copy, Paste, and Clear) are available when entering message text.
2. Continue until all messages are entered. Up to 25 user-defined messages may be created.

To apply holdings messages:

1. For each locally held journal, enter the number of the desired holdings message in the Message column to the left of the journal title. Only one message may be assigned per journal title.

Use the scroll bar to move through the journal titles, or click on the **Move to** button and type in a journal name to go directly to that journal.

2. Continue until messages have been assigned to all locally held journals.

After entering your last number, click your cursor outside of the message column, to ensure the last number entered will be saved.

3. Exit the program.

Note: It is possible to assign the number of a blank message to a journal title. If a blank message is assigned, the text displayed in the record in the main program will be "No holdings message entered."

Once your messages have been created and applied to your local holdings, they will be automatically saved when you exit the program. Markings are saved in the HOLDINGS.DAT file. The previous session's markings are contained in a HOLDINGS.BAK file. If your HOLDINGS.DAT file should become corrupt, you can copy the HOLDINGS.BAK file as the new HOLDINGS.DAT file.

Viewing Holdings Information

Once holdings messages have been assigned, you can view a list of your local holdings. To see only locally held journals, select **Locally Held Journals** from the View menu. (Product selections are not available when viewing locally held journals.)

Exporting Holdings Information

While there is no Print option in the ISI CD Editions Holdings Utility, both your journal list and local holdings list can be exported. Exported files can be imported into the text editor of your choice, then reformatted and/or printed.

The export file format is ASCII, tab-delimited, and contains

- the date of creation of the file
- the View/Restrict options that apply to the file
- the messages for which text has been entered (All messages are listed, whether or not they appear in the journal list, with the exception of blank messages.)
- journal information (message number, full journal title, ISSN)

To export the current journal list:

(This option will not be available if “Locally Held Journals Only” is selected under the View menu.)

1. Select **Export Journal List** from the File menu. The Export Journal List dialog box appears.
2. Type a name for the file in the **File Name** input box. Do not change the .hld file extension.
3. If necessary, select the directory and drive where the file is to be saved from the **Directories and Drives** lists.
4. Select the file type (*.HLD) from the **Save File as Type** drop-down list.
5. Click on **OK**.

To export the current local holdings list:

(This option will not be available unless “Locally Held Journals Only” is selected under the View menu.)

1. Select **Export Local Holdings List** from the File menu. The Export Local Holdings List dialog box appears.
2. Type a name for the file in the **File Name** input box. Do not change the .hld file extension.
3. If necessary, select the directory and drive where the file is to be saved from the **Directories and Drives** lists.
4. Select the file type (*.HLD) from the **Save File as Type** drop-down list.
5. Click on **OK**.

Updating Holdings Information

You should update your journal list(s) with each new CD issue, in order to keep your journal lists current. Updating your lists will not remove the holdings messages in previous lists. Should you choose to update holdings less frequently, the Restrict List to Journal Changes option allows you to restrict the list to those titles added since you last updated your holdings file.

To update your journal lists, simply place the new CD in your CD-ROM drive, then open the Local Holdings Utility program. The JOURNAL.CVG file will automatically be updated and any previous holdings marks retained.

Exiting

Exiting the program automatically saves the holdings messages entered during the current session. Markings are saved in the HOLDINGS.DAT file. No other settings (e.g., View menu and Restrict List options) are saved.

V. Downloading Databases to Hard Drives

You can download databases from ISI CD Editions CDs to a hard drive. After downloading a database to the hard drive, you won't need to have the CD in the CD-ROM drive to open the database. You may want to do this if you only have one CD-ROM drive but wish to access and search more than one database at a time.

General Guidelines Before Downloading

The destination disk must have enough space to accommodate all the files in each dataset.

To determine the size of files in CD updates, use File Manager in MS-Windows. Follow these steps after launching File Manager:

1. Reveal the hidden files that make up ISI datasets on the CD-ROM. Choose the **By File Type...** option from the View menu. Check "Show Hidden/System Files" box in this dialog, and close the dialog.
2. Click the icon for the destination drive and check the amount of free disk space, which is reported in the status bar at the bottom left of the window.
3. Click the icon for the source drive (and directory, if necessary) and check the amount of disk space used.
4. Make sure the free disk space on the destination drive is greater than the disk space used on the source drive before attempting to download the database to the hard drive.

Note: The DOS commands DIR and CHKDSK will not give you this information.

For the ISI CDE program to access the data, the destination drive must be accessible as an MS-DOS drive. Programs running directly under VAX or Unix cannot effectively use the data. However, if the dataset can be viewed as the root of a DOS drive using something like NFS or a Unix box, ISI programs should work.

All the files of the dataset on the hard drive must be at the root level (or one sub-directory level deep, depending on the "Disable Scanning of Sub-directories for Databases" option of the CDE Setup Utility) of either a physical or logical drive. Use the MAP ROOT command on Novell® networks.

The transfer may take a few minutes up to a few hours, depending on the size of the dataset and the speed of your drives. Removing screen savers and wall papers during copying will speed up this process.

Transferring ISI Data From a CD-ROM Disc to a Hard Drive

Transferring the files is most easily done by using File Manager of MS-Windows.

To transfer ISI data from a CD-ROM to a hard drive:

1. Create a sub-directory for the data on the destination drive.
Note: Sub-directories are only scanned if the “Disable Scanning of Sub-directories for Databases” option of the CDE Setup Utility is not checked. If it is checked, under Disk/Network connections you can use the MAP ROOT command to designate a drive letter for this path.
2. Click the CD-ROM drive icon in the tool bar to designate it. Reveal the hidden files that make up the ISI datasets on the CD-ROM. Choose the **By File Type...** option from the View menu. Check the “Show Hidden/System files. Close the dialog.
Note: 1997 Annual databases and subsequent databases do not have hidden files. Only databases before 1997 Annual databases have hidden files.
3. If you only have one File Manager drive window open, Under the Windows menu, open a new window and click the destination drive icon. Choose the Tile option in the Windows menu to maximize both open windows.
4. Select all the files on the CD-ROM. A fast way to do so is to click the CD-ROM’s window, choose the Select... option from the File menu, and indicate “all files” in the dialog by entering “*.*”.
5. Drag the selected (highlighted) files from the CD-ROM to the new destination directory or folder.

VI. Technical Help

If you have any questions regarding the installation or use of the ISI CD Editions program, contact the ISI Technical Help Desk for further assistance.

When you contact the Technical Help Desk, please place the phone near your computer terminal so that you can supply our representatives with complete descriptions of error messages and have the following information available:

- Your customer number
- The name and version number of your operating system (e.g., Windows, version 3.1)
- A description of your computer configuration (e.g., AST 486, 33 MHz, 8MB RAM, 100MB hard drive)
- A complete description of the problem, including any error messages and when they occurred.

To contact the Technical Help Desk:

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Technical Help Desk, 3rd Floor

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Philadelphia, PA 19104 U.S.A.

Phone: (800) 336-4474 (U.S. and Canada) or (215) 386-0100, ext. 1591

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PROGRAM FILES

\APPLICATION DIRECTORY

- cdeadmin.exe
- cdeadmin.hlp
- cdewin.exe
- cdewin.hlp
- cdewin.ini
- cp.ini
- hdk3anim.dll
- hdk3ctnt.dll
- holdings.exe
- holdings.hlp
- holdings.ini
- isiwidg.dll
- journal.cvg
- mfc_ext.dll
- mfc250.dll
- mfco250.dll
- mfcoleui.dll
- print.dll
- readme.txt
- recfmt.dll
- risxtd16.exe
- ter.dll

READ-ONLY ACCESS, EXCEPT *.INI FILES,
WHICH HAVE READ AND WRITE ACCESS

C:\WINDOWS\SYSTEM

- compobj.dll
- hdk3anim.dll
- hdk3ctnt.dll
(hdk3 dll's created at initial
program launch, for viewing help
files)
- ole2.dll
- ole2prox.dll
- ole2disp.dll
- ole2nls.dll
- ole2conv.dll
- storage.dll
- typelib.dll

C:\ISICDE.TMP

*(created at initial program launch,
for temp files)*

***.prw** (search profile files)

***.fmt** (custom format files)

***.txt** (saved records)

*(created when files saved by user,
to directory of their choice)*

READ AND WRITE ACCESS

Figure 1. ISI CD Editions data and program files



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